

IRS News Release

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IRS Names New Members to TE/GE Advisory Group

IR-2006-69, April 26, 2006

WASHINGTON — The Internal Revenue Service today announced the selection of eight new members for the Advisory Committee on Tax Exempt and Government Entities (ACT). The ACT is a formal body of external stakeholders in the specialized areas of employee retirement plans, exempt organizations, tax-exempt bonds and federal, state, local and Indian tribal governments. The appointees, who will assume their duties in June, will join 13 returning committee members. They are listed below by area of expertise.

Employee Plans

Susan D. Diehl is the president of PenServ Inc., a nationally recognized pension consulting firm providing services to more than 800 financial organizations on sponsoring retirement plans. A major part of her activities and products involves educating individuals and practitioners on the whole range of retirement plans — including IRAs, Qualified Plans, 403(b) and 457 plans, and Nonqualified Deferred Compensation Plans. Diehl has a Bachelor of Arts in mathematics from Arcadia University in Pennsylvania.

Dodi Walker Gross is an employee benefits lawyer and partner with Reed Smith LLP, one of the 10 largest law firms in the United States. In this capacity, she represents local, national and multinational corporations with operations in the United States, Puerto Rico, Canada, Germany, United Kingdom and other countries. Her work encompasses the full range of employee benefits matters with respect to retirement, savings and welfare plans. It also involves executive compensation — including design, administration, compliance, dispute resolution, government audits, and corporate and employment transactions. Gross has a Juris Doctor from Duquesne University School of Law.

Exempt Organizations

Bonnie Brier is the general counsel of The Children's Hospital of Philadelphia. In her 25 years of practice in the field of exempt organizations, she has specialized in the area of health care, compensation and benefits, and charitable giving. Brier has a Juris Doctor from Stanford University.

Ana Thompson is the managing director of finance and administration for the Charles and Helen Schwab Foundation, where she is responsible for leadership of the foundation, grant-making, oversight of short- and long-term financial planning, and regulatory compliance. Thompson has a Masters of Business Administration from the Stanford Graduate School of Business.

Tax-Exempt Bonds

Joan M. DiMarco is the managing partner of the Philadelphia office of BondResources Partners LP. Her background includes a wide range of experience in consulting to investment bankers, law firms, issuers and governmental agencies. She has more than 30 years of experience in municipal bonds and structured finance. DiMarco is a certified public accountant and has a Bachelor of Science in business administration from Drexel University.

Federal, State and Local Governments

Steven W. Hoffman is the tax manager for Ohio State University, where he is responsible for issues concerning taxation in state and local governments and tax-exempt entities. His background includes 15 years with the IRS and with OSU's tax-exempt bond activity. Hoffman, an enrolled agent and a certified financial planner, has a Master of Science in Taxation from Capital University in Ohio.

Indian Tribal Governments

Sandra Starnes is a certified public accountant who works as the cash management officer for the Port Gamble S'Klallam Tribe in the state of Washington. Her experience includes working with non-profit organizations. Starnes has a Bachelor of Arts in accounting and business administration.

Mary J. Streitz is a partner in the law firm of Dorsey & Whitney LLP, with wide experience in a wide variety of tax issues affecting Indian tribal governments and other tribal entities. She has represented tribes in all regions of the country. She also heads up her firm's national Indian tax practice. Streitz has a Juris Doctor from the New York University School of Law.

Current members who are returning to the committee are:

Employee Plans

- Charles Lax, Southfield, Mich.
- Charles F. Plenge, Dallas.
- Daniel J. Schwartz, St. Louis.
- Michael S. Sirkin, New York.

Exempt Organizations

- Betsy Buchalter Adler, San Francisco.
- Sean Delany, New York.
- Julie Floch, New York.
- Suzanne Ross McDowell, Washington, D.C.

Tax-Exempt Bonds

- Robert Donovan, Providence, R.I.
- Maxwell D. Solet, Boston.

Federal, State and Local Governments

- Nicholas C. Merrill, Jr., Springfield, Ill.
- Julian M. Regan, Marlborough, Mass.

Indian Tribal Governments

- Lenor Scheffler, Minneapolis, Minn.

The ACT was established in May 2001 under the Federal Advisory Committee Act to provide an organized public forum for discussion of relevant issues affecting the tax exempt and government entities communities. It allows the IRS to receive regular input with respect to the development and implementation of policy concerning employee plans, exempt organizations, tax-exempt bonds and federal, state, local and Indian tribal government issues.